Enterprise Content Management
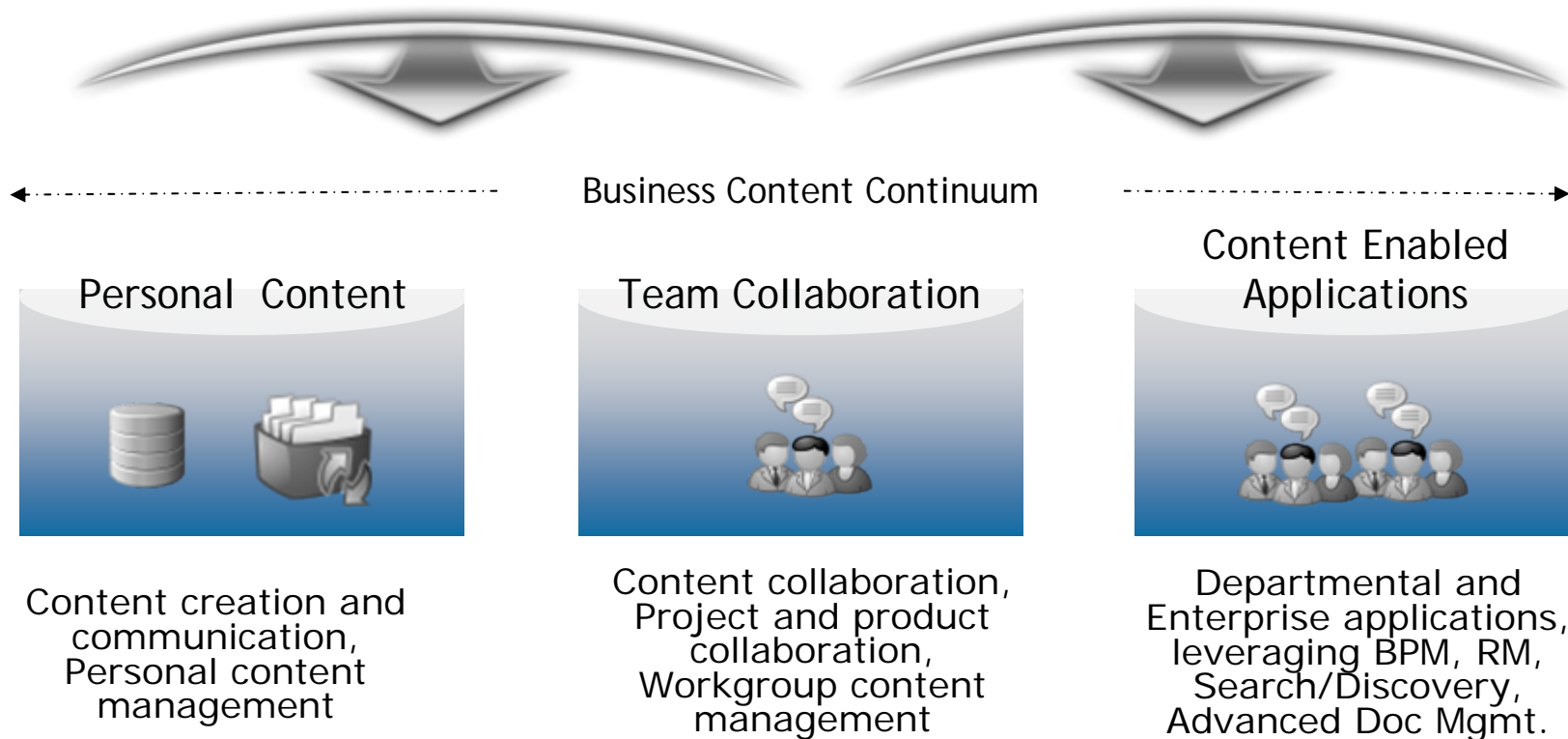
IBM Connector for SharePoint

Jeff Peterman

The Business Content Services Continuum

Ad-hoc & Basic Content Services   *Situational & Enterprise Application Services*

Business Content Continuum

Personal Content
Team Collaboration
Content Enabled Applications

Content creation and communication, Personal content management

Content collaboration, Project and product collaboration, Workgroup content management

Departmental and Enterprise applications, leveraging BPM, RM, Search/Discovery, Advanced Doc Mgmt.

Enterprise Content Services (Business Documents, Imaging, Capture Report Management, RM, BPM, Classification, Archiving, Analytics, Search)

Collaboration and ECM

- SharePoint

  - Enhances team productivity through collaboration

  - Consistent user experience

  - Reduces training costs

- FileNet P8 or CM V8

  - Discipline and controls (e.g. retention and compliance)

  - Business process management

  - Central management (e.g. archival and backup)

  - Scalability

Use Cases for Integrated BCS/ECM

- Archival – keep SharePoint humming

- Assets only in the trusted vault

  - Not all documents are assets

  - Assets are sensitive

- Compliance

- Business process management

- Information reuse

- User-experience

IBM SharePoint Integration

Web Parts Connector, What is it?

- ❑ Collection of Web Parts which allow end users to interact with documents in FileNet P8 directly from the SharePoint

- ❑ Merges basic document management capabilities with Microsoft user experience

- ❑ Real-time access of P8 content from SharePoint

  ### *Capabilities*:

  ❑ View/Browse/Search

  ❑ Check in/out

  ❑ Upload document

  ❑ Edit

  ❑ Edit properties

  ❑ Delete

  ❑ Column Sorting & Filtering

  ❑ Business Process Management Support

  - ❑ Personal Inbox (tasks)

  - ❑ Public Queues

  - ❑ Launch P8 BPM Workflow from SharePoint

  ❑ Stored Search Support

ICC for SharePoint, What is it?

- ❑ SharePoint initial content authoring environment, & content ultimately swept into & accessed from P8

- ❑ Provides SharePoint basic content services and collaboration, but customers need a secure and centrally managed repository

- ❑ Provide a seamless and automated way for content to transition into an ECM repository

  ### *Capabilities*:

  - ❑ SharePoint-created content move into & managed by the ECM repository; and deleted from SharePoint
  - ❑ Move and Retain Link ("stubbing")
  - ❑ Retention of created-by, modified-by metadata
  - ❑ "Sweeping" of pre-existing SharePoint site content
  - ❑ Automatic SharePoint child site discovery
  - ❑ Central Configuration Utility with common repository
  - ❑ Remote Deployment
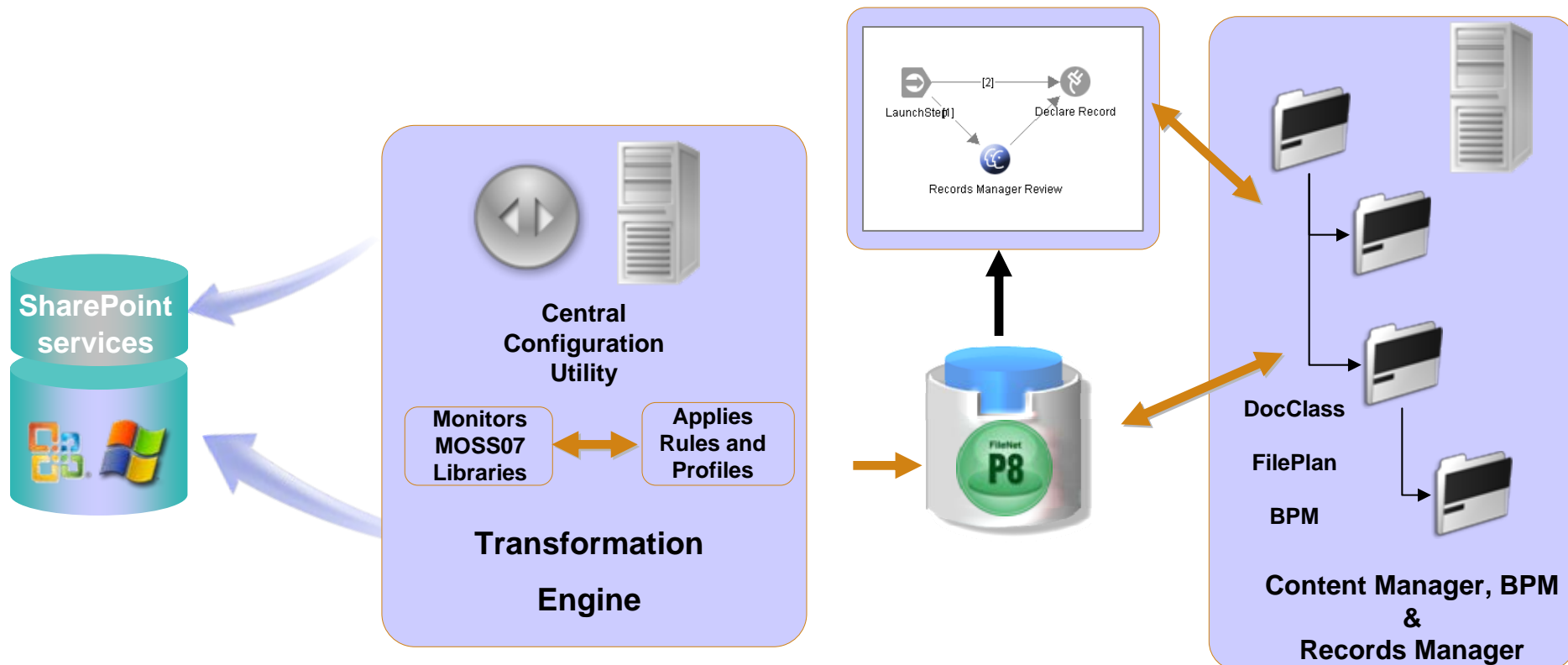 - ❑ Records Management support

Supports:

- WSS 3.0 & MOSS 2007
- IBM FileNet P8 4.x

SharePoint

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SharePoint Integration
Delivering ECM to all Information Workers

SharePoint services

Central Configuration Utility

| Monitors MOSS07 Libraries | Applies Rules and Profiles |

Transformation Engine

LaunchStep[1] — [2] — Declare Record

Records Manager Review

FileNet P8

DocClass

FilePlan

BPM

Content Manager, BPM & Records Manager
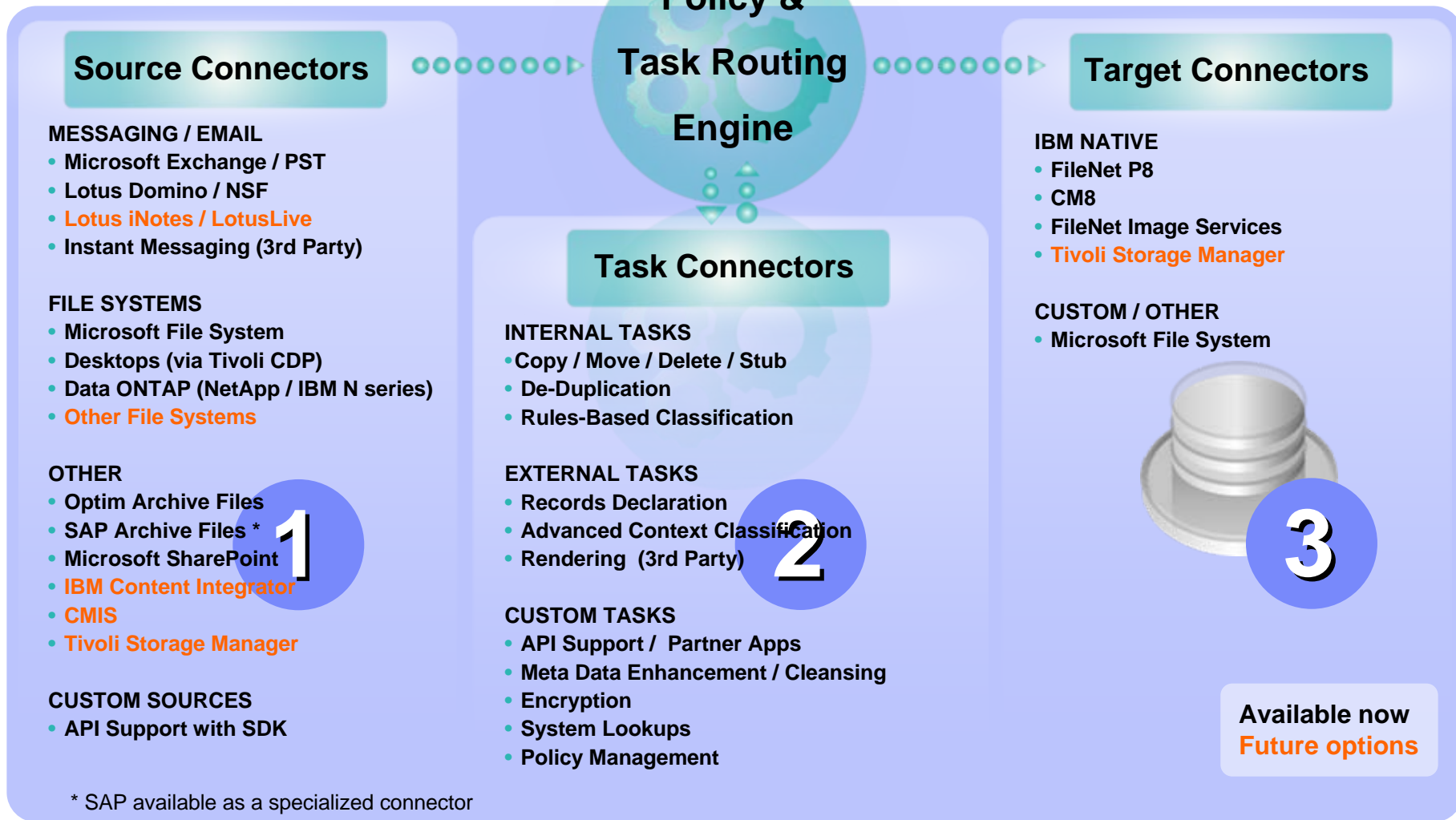
– Deliver information that is unified, accurate and in context with critical business processes and policy management.

– Manage risk with automated compliance, records management and legal discovery, and control security, access and authorization.
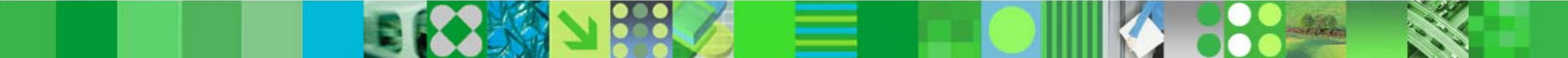
Content Collector Overview
Modular and Extensible … Powered by Unique Task Routing

Policy & Task Routing Engine

Source Connectors

MESSAGING / EMAIL
- Microsoft Exchange / PST
- Lotus Domino / NSF
- Lotus iNotes / LotusLive
- Instant Messaging (3rd Party)

FILE SYSTEMS
- Microsoft File System
- Desktops (via Tivoli CDP)
- Data ONTAP (NetApp / IBM N series)
- Other File Systems

OTHER
- Optim Archive Files
- SAP Archive Files *
- Microsoft SharePoint
- IBM Content Integrator
- CMIS
- Tivoli Storage Manager

CUSTOM SOURCES
- API Support with SDK

Task Connectors

INTERNAL TASKS
- Copy / Move / Delete / Stub
- De-Duplication
- Rules-Based Classification

EXTERNAL TASKS
- Records Declaration
- Advanced Context Classification
- Rendering (3rd Party)

CUSTOM TASKS
- API Support / Partner Apps
- Meta Data Enhancement / Cleansing
- Encryption
- System Lookups
- Policy Management

Target Connectors

IBM NATIVE
- FileNet P8
- CM8
- FileNet Image Services
- Tivoli Storage Manager

CUSTOM / OTHER
- Microsoft File System

1

2

3

Available now
Future options

* SAP available as a specialized connector

Questions?

Enterprise Content Management

Jeff Peterman
petermaj@us.ibm.com